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# CROP & MARKET INDUSTRY INFO





# MARKET UPDATES

## ROUND TOMATOES

Florida round tomato maturity has slowed under persistent cool weather, resulting in lighter volumes and a smaller size profile that will likely persist for the next two weeks. Yields have been trimmed back as well, but so far supply has been adequate to cover current demand for Florida fruit. The main weather concern now is the potential freeze: crops in the Immokalee area and points north are at higher risk for cold damage, while fields farther south, including Lipman's Naples acreage, are expected to fare better if temperatures hold as forecast. On a positive note, current quality out of Florida is very good. In the West, round tomato supplies are running light to moderate as growers wait on improved weather to push crops along. Extended overcast conditions forecast for much of the coming week are likely to slow that recovery, and it may be about 10 days before we see a more noticeable increase in volume. Quality on Western product is ranging from fair to good, largely depending on the growing area and how much rain they absorbed during the last two consecutive storm systems.

## ROMA TOMATOES

Roma maturity has been slowed in Florida by the recent swings in cool weather, keeping the size profile on the smaller side. Even so, supplies have been running light to moderate this week. With a potential freeze in the forecast from the weekend into Monday, Florida growers are working ahead to pull as much mature fruit as possible before temperatures drop. Lipman's crops are still coming out of the Naples area, which sits a bit farther south and may escape the worst of any freeze damage, but overall production is still expected to dip over the next week as plants absorb the shock of the cold. On the plus side, quality has been very nice, with only occasional minor defects showing up in the pack. In Mexico, typical seasonal roma volumes have not yet materialized, as cool and wet conditions have slowed maturity there as well. We do anticipate seeing a bit more fruit come on in about a week or so, as the weather stabilizes and fields recover from last week's rain event.

## ORGANIC GRAPE TOMATOES

Organic roma tomato supplies are limited to fair, but quality is the concern. Weather has caused issues with decay, spotting, etc. which further limits the already strained supply. Look for improvements in 4-6 weeks when new crops come online and plant health improves on current crops.

Organic grape tomato supplies are steady this week, with volume coming from both Baja and Sinaloa. Availability has been consistent, and quality is strong out of both regions, with good color, firmness, and flavor. Barring any unexpected weather disruptions, we expect this good quality and stable supply to continue in the near term.

## GRAPE TOMATOES

Grape tomato production has been steady at moderate levels in Florida, with very nice quality overall and only slightly smaller sizing than we typically see for this time of year. Newer plantings should handle the upcoming cold better, as their heavier foliage offers more protection to the fruit, but we do expect some short-term tightening in supply as older plantings either finish out or experience cold damage. Lipman's current harvests are centered in the Naples area, which is projected to avoid the hardest freeze, but much of the other Florida acreage may be more exposed to weather risk. In Mexico, Culiacán's grape tomato volumes are running on the lighter side as cool, wet conditions have held back production, though quality remains solid. Barring further weather setbacks, supplies out of Mexico should gradually improve over the next few weeks as fields respond to moderating conditions.

## GREEN BELL PEPPERS

South Florida bell pepper farms are harvesting aggressively this week to get ahead of the projected freezing temperatures expected this weekend. There is strong supply available right now in all sizes, with volume skewing heavier to larger fruit. Overall quality is good, though crews are grading out some bruised peppers tied to the recent rain and cold. How next week looks will depend heavily on whether the forecast freeze materializes and how hard it hits the fields; a significant event could tighten supplies fairly quickly once the current flush moves through. Out West, harvests were temporarily delayed by rain, which has shortened supply in the near term, but growers are now back in the fields with fairly steady volume. Quality is quite variable, ranging from fair to good, as some lots show rain-related issues such as decay, bruising, shriveling, and reduced shelf life. Western supplies should rebound to more typical levels as we move forward, but they may feel a bit tighter if Eastern buyers need to lean more heavily on Western product following any weather-related impacts in Florida.

## ENGLISH CUCUMBERS

Mexico's English cucumber supplies remain at the very light levels we've been seeing over the past week, a direct result of earlier challenging growing conditions. Quality is running fair to good overall, though there are some reports of shrivel and lighter color on arrival. Because English cucumbers really need bright, consistent sunlight to size and fill out properly, the recovery back to more typical production levels could be delayed. Next week's gloomy, overcast forecast is likely to slow plant vigor and delay any meaningful improvement in volume, so plan for continued tight availability for at least the next 7-10 days.

## YELLOW AND ZUCCHINI SQUASH

Florida yellow and zucchini squash supplies are extremely limited this week following earlier weather impacts. The weekend forecast is a major concern: a hard freeze in the Immokalee area could all but eliminate Eastern supply, leaving the market dependent on the lighter acreage in Homestead—assuming that area avoids a freeze as well. There is also some risk to spring plantings slated to start in mid-March, though we won't know the full extent until after this weather system moves through. On the Western side, Mexico is finally seeing a bit more zucchini coming on to complement its relatively steady yellow squash production. That said, supplies could soften again over the next week, as the expected overcast conditions are not ideal for squash growth or sizing. Quality on both yellow and zucchini has been running fair to good, but zucchini in particular is skewing toward medium sizes rather than the smaller "fancy" profile. Overall, the squash market remains tight and very weather-sensitive in the near term.

## CHILE PEPPERS

Florida's chile pepper situation remains very tight, with crops at a low point in their production cycle and minimal supplies across all SKUs. Cubanelles are especially short, as Florida is currently the only active production region for this item. Quality on Eastern chilies is running fair to average, with most fruit coming out of older plantings that are naturally showing more wear. Spring crops are already in the ground and targeted for mid-March harvest, and there is understandable concern about how this weekend's cold weather might affect both existing fields and younger plantings. In the West, most chile volume is coming out of Sinaloa, where supplies are running light to moderate on the main varieties and quality is generally good. Tomatillos remain the key exception: husked tomatillo volume is very limited, in part due to ongoing quality issues tied to earlier weather events. As a result, we expect to see more peeled tomatillo product in the market over the coming days as growers work through challenged lots and try to salvage usable fruit. Overall tomatillo quality is likely to remain pressured in the near term as the cumulative impact of prior weather continues to show up in the packout.

## MINI CUCUMBERS

Conventional mini cucumber supplies are extremely limited this week. Poor growing conditions have delayed the start of new plantings, so the market is relying heavily on older fields that simply aren't keeping up with demand. On top of that, quality on current production has been weak, with packouts running around 50%, which tightens available volume even further. Growers are projecting new crops to come online in the next 2-3 weeks, but until those plantings start producing, minis will remain a very challenging item to cover, with sporadic availability.

## 7 OPPORTUNITIES TO BOOST PRODUCE SALES IN 2026

[THEPACKER.COM](http://THEPACKER.COM)

January 19, 2026

From the surprising new power shopper to engaging Gen Z and millennials to redefining value in the produce department, here's a look at what's driving fresh produce consumption in the year ahead.

### Men Are the New Produce Power Players

One of the most significant shifts in the 2026 data is the rise of the male shopper. Men reported higher purchase rates for "differentiated" produce — think organics, super-premium strawberries, lion's mane mushrooms, value-added produce and purple sweet potatoes — than women. And not only are they buying more specialty items, but they are also willing to pay a premium to get what they want.

### Gen Z and Millennials Remain the Drivers of Different

If it's new, local or organic, younger shoppers are likely the ones buying it. Gen Z and millennial consumers continue to lead the charge in purchasing specialty items like jumbo blueberries, sweet snacking peppers and specialty mushrooms. For these generations, produce isn't just a side dish or snack; it's an experience.

### Organic Produce Growth Driven by Younger Shoppers

While the majority of consumers still predominantly purchase conventionally grown produce, the organic market remains resilient, driven by men and younger shoppers. Among organic buyers, nearly one-third (30%) of respondents said 26% to 50% of their fruit and vegetable purchases are organic, a trend led by millennials. About 8% of men surveyed said they were willing to pay a staggering 50% more for organic fruits and vegetables — twice the rate of women. While most organic buyers are comfortable with a 10% to 24% markup, this "super-loyal" segment is one to watch.

### Big Box Stores Are the Go-To for Organics

Fresh Trends 2026 finds that chain supermarkets such as Walmart and Target have become the primary destination for organic produce, with 48% of all organic buyers shopping those stores. Among younger shoppers, that percentage is even higher. Fifty-nine percent of Gen Z organic produce shoppers and 55% of millennials indicate they shop chain supermarkets for organic produce, compared with 48% of Gen X and 30% of baby boomers.

### Value Is About More Than Just Cheap

While inflation is a concern, the 2026 value proposition for produce isn't just about the lowest price. Consumers are looking for functional fuel, flavor, versatility and culinary experiences. They want produce that delivers the whole package: health benefits, deliciousness, fiber, protein, convenience and more.

### Think Meal Solutions Versus Commodities

Circana estimates that 78% to 80% of America's calories are consumed at home. This is a huge opportunity for produce to market fruits and vegetables as meal solutions. The industry can do more to demonstrate how a bag of potatoes or a clamshell of tomatoes can be used across multiple eating occasions from snacks to salads to main courses, for example. This meal solutions mindset also fits with the male-dominated trend of produce-, fiber- and protein-rich meal prepping — cooking all the meals for the week(s) ahead in one day.



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## WHY PROTEIN AND FIBER BECAME MENU MUST-HAVES

[NRN.COM](#)

We've seen a barrage of protein launches to start the new year, and we've heard plenty of rumblings that fiber is on deck to be the next major menu trend. Now we have new data suggesting what is driving this momentum.

More consumers are ordering high-protein and high-fiber options because such options support their overall health. These consumers seem to be more motivated than ever: 62% of respondents surveyed said they "sometimes, often, or always" look for high-protein options on a menu, while 58% are likely to order from a "protein-rich" menu section. Further, 48% said they're likely to choose a meal because it's high in protein and 38% are willing to pay more for such options. Respondents look for protein most during dinner (53%) followed by breakfast (25%) and lunch (14%). To illustrate just how big an opportunity protein has become for operators, consider that nearly 50% of consumers say they would switch restaurant brands for meals with more protein options.

Fiber is also starting to prove more intriguing to consumers, with 45% reporting they "sometimes, often, or always" look for high-fiber options. Forty-one percent said they're likely to order from a fiber-rich menu section. Additionally, 30% say they are more likely to choose a meal because it's high in fiber, while 25% are willing to pay more for such a meal. Driving these respondents is an aspiration for better digestive health (38%), while 19% said fiber is better for overall health. Digestive health is a growing wellness trend because social media has popularized "fibermaxxing," which is simply adding more fiber-rich foods like fruits, vegetables, legumes, and whole grains into a diet plan. Further, there is a growing interest in gut health as more consumers — about 23% of U.S. households — are on GLP-1 medications. Circana data finds that most of these consumers (63%) seek more vegetables from restaurant menus, while 55% seek more fruit options.

January 27, 2026

The demographics driving both trends are millennials, households with annual incomes over \$100,000, and GLP-1 users. Seventy percent of millennials actively seek protein options, compared to 62% overall, while 53% actively seek fiber options, compared to 45% overall. Among GLP-1 users, 56% choose high-protein meals, compared to 48% on average, while 42% choose high-fiber meals, versus 30%.

For the long-term, protein offerings based on limited-time performance can be scaled, fiber-rich menu sections can be added, and restaurants that do so can be positioned as destinations for both protein and fiber.



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<https://events.farmjournal.com/west-coast-produce-expo-2026>



## TOMATO SNAPSHOT

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INGREDIENTS. A small icon of a tomato and a bowl of hummus.

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